

USDA Weekly Retail Turkey Feature Activity

Fri. Nov 18, 2005

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/18 thru 11/24.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

THIS WEEK	NATIONAL SUMMARY															
Peature Rate 1		THIS WEEK		LAST WEEK		Activity Index: 6 Week Comparison						■White Parts	Dark Parts	■Gro	ound [■Whole
Activity Index 21	Feature Rate 1/	· · · · · · · · · · · · · · · · · · ·		•		100,000										
MOLE BIRDS: Fresh	Special Rate 4/	23.0	6%	11.3	7%											
WHOLE BIRDS: Fresh Hens 23,590 1,16 840 1,20 7 1,550 0,74 2,590 0,74 1,550 0,74 2,590 0,74 1,2590 0,74 2,790 0,74 2,790 0,74	Activity Index 2/	114,680		38,820]										
Fresh		Stores V	Vtd Avg	Stores V	Vtd Avg	75,000										_
Frozen - Hens																
Frozen - Hens		23,590	1.16	840												
## -Toms 23,460 0.71 12,630 0.72 7.75 7	" - Toms	22,970	1.15	640		<u> </u>										
Breast: Bone-in, whole Fresh 5,510 2.25 550 2.08 Frozen 8,380 1.43 1,330 1.37						<u>8</u>										
Breast: Bone-in, whole Fresh 5,510 2.25 550 2.08 Frozen 8,380 1.43 1,330 1.37		23,460	0.71	12,630	0.72	50,000										,910
Bone-in, whole Fresh 5.510 2.25 550 2.08 Frozen 8.380 1.43 1.930 1.37 Frozen Split, bone-in Fresh Frozen Split, bone-in Fresh Frozen Split, bone-in Fresh Frozen Split, bone-in Fresh Frozen Split, bone-in Split	PARTS:					act										69
Fresh Frozen Rotisserie Sometic Trenders Frozen Turkey Featuring - 11/18 thru 11/24 The biggest retail sales week of the year for turkey is in full swing with 100% of sampled stores promotional gimmicks are signifyl yolder on average than last week lead by whole birds are signifyl yolder on average than last week but are featured twice as much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have signifyl yolder on average than last week at higher price levels. Ground Turkey Activity 1.50 1.54 2.70 1.59 2.77 2.79 6.650 2.56 2.50 2.38 5% lean 130 1.65 1.160 1.71 1.71 2.77 2.	Breast:															
Hotel Style Fresh	Bone-in, whole															
Hotel Style Fresh	Fresh	5,510	2.25	550	2.08	25,000									970	_
Fresh Frozen Split, bone-in Fresh Rotisserie 1,780 7.96 30 7.99 Rotisserie 2,270 2.79 6,650 2.66 Rotiks Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: 2,270 2.79 6,650 2.66 Patties 160 2.42 360 2.50 Rotisserie 2,270 2.79 6,650 2.67 Rotisserie 3,309 1.69 Rotisserie 3,309 1.69 Rotisserie 4,780 7.96 30 7.99 Rotisserie 5,309 1.420 3.96 Rotisserie 6,349 Turkey Featuring - 11/18 thru 11/24 The biggest retail sales week of the year for turkey is in full swing with 100% of sampled stores promoting turkey for Thanksgiving. Feature activity is up 30% from last week lead by whole birds as fresh bird ads are out in force with some competition by seasonal chicken and ham items noted. Ad prices for frozen birds are smuch as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.	Frozen	8,380	1.43	1,930	1.37				. 0						15,	
Fresh Frozen Split, bone-in Fresh Rotisserie 1,780 7.96 30 7.99 Rotisserie 2,270 2.79 6,650 2.66 Rotiks Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: 2,270 2.79 6,650 2.66 Patties 160 2.42 360 2.50 Rotisserie 2,270 2.79 6,650 2.67 Rotisserie 3,309 1.69 Rotisserie 3,309 1.69 Rotisserie 4,780 7.96 30 7.99 Rotisserie 5,309 1.420 3.96 Rotisserie 6,349 Turkey Featuring - 11/18 thru 11/24 The biggest retail sales week of the year for turkey is in full swing with 100% of sampled stores promoting turkey for Thanksgiving. Feature activity is up 30% from last week lead by whole birds as fresh bird ads are out in force with some competition by seasonal chicken and ham items noted. Ad prices for frozen birds are smuch as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.	Hotel Style						,24(3,77	000		610	1 6 6	02,6	0	0
Split, bone-in Fresh To 3.99 Rotisserie 1,780 7.96 30 7.99 60 3.49 60 3.49 60 3.49 60 3.49 60 3.49 60 3.49 60 3.49 60 3.49 60 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 3.88 620 62	Fresh							130		3,56	90	6,98	5,1	5 0	,53	.,27
Turkey Featuring - 11/18 thru 11/24 Sample	Frozen					0	52	-	8 6	0	8,	12	36		14	N
Fresh Rotisserie 1,780 7.96 30 7.99 7.99 8.00 7.99 8.00 8.00 7.99 8.00 8	Split, bone-in						Oct 14-20		Oct 21-27	Oct 28-Nov-	03	Nov 04-10	Nov 11	-17	No	v 18-24
Boneless, whole	Fresh			70	3.99											
Cutlets 180 3.99 1,420 3.96 Strips 120 3.99 430 4.21 Tenders 620 3.88 Drumsticks 990 1.29 Thighs 380 1.12 Wings 970 1.33 Necks Smoked Drumsticks Smoked Drumsticks Smoked Drumsticks Smoked Necks GROUND TURKEY: 2,270 2.79 6,650 2.66 Patties 160 2.42 360 2.50 Sausage 730 2.29 1,950 2.39 85% lean 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17	Rotisserie	1,780	7.96	30	7.99		Turkey Fe	aturin	ng - 11/18 thru 11	1/24		Ground Turkey A	ctivity ——	93% ——	-patties -	breast
Strips Tenders 120 3.99 430 4.21 620 3.88 Drumsticks	Boneless, whole			60	3.49						2,600					
Tenders G20 3.88	Cutlets	180	3.99	1,420	3.96	The biggest retail sales week of the year for turkey is in full swing										
Drumsticks 990 1.29 Thighs 380 1.12 Wings 970 1.33 Necks Smoked Drumsticks 190 1.54 Smoked Wings Smoked Necks GROUND TURKEY: 2,270 2.79 6,650 2.66 Patties 160 2.42 360 2.50 Sausage 730 2.29 1,950 2.39 Significant 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17 Tresh bird ads are out in force with some competition by seasonal chicken and ham items noted. Ad prices for frozen birds are slightly lower on average than last week but are featured twice as much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.	Strips	120	3.99	430	4.21											
Thighs 380 1.12 Wings 970 1.33 Wecks Smoked Drumsticks 190 1.54 Smoked Wings Smoked Wings Smoked Necks GROUND TURKEY: Patties Sausage 730 2.29 1,950 2.39 Sausage 730 2.29 1,950 2.39 Signed Pattern Signer Shape 1,590 2.17 Signer Shape 1,590 2.17 Chicken and ham items noted. Ad prices for frozen birds are slightly lower on average than last week but are featured twice as much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. Sousage 85% lean 130 1.65 1,160 1.71 1,590 2.17	Tenders			620	3.88											
Wings Necks Necks Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: Patties Sausage 730 2.29 1,950 2.39 Sightly lower on average than last week but are featured twice as much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. Silightly lower on average than last week but are featured twice as much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.	Drumsticks	990	1.29						•							
Necks Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: Patties Sausage 85% lean 93% lean 970 1.54 210 1.59 150 1.64 210 1.59 150 1.64 210 1.59 2.70 2.79 6,650 2.66 Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. 600 650 650 650 650 650 650 650 650 65	Thighs	380	1.12			· · · · · · · · · · · · · · · · · · ·								.590		
Necks Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: Patties Sausage 730 2.29 1,950 2.39 Substitute lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. Solution 1,100 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,270 1,000 1,	Wings	970	1.33								1,600		1,730			
Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: Patties Sausage 730 2.29 1,950 2.39 Subsequence Smoked Drumsticks Smoked Wings Smoked Necks Patties Sausage 85% lean 93% lean 150 1.54 210 1.59 150 1.64 Pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.	Necks											1,270	1,270		1,59	
Smoked Wings 150 1.64 Smoked Necks 2,270 2.79 6,650 2.66 Patties 160 2.42 360 2.50 Sausage 730 2.29 1,950 2.39 85% lean 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17	Smoked Drumsticks	190	1.54	210	1.59											
Smoked Necks 2,270 2.79 6,650 2.66 Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. 650 2.29 1,950 2.39 Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted. 600 650 <t< td=""><td>Smoked Wings</td><td></td><td></td><td>150</td><td></td><td></td><td></td><td></td><td></td><td></td><td>1,100</td><td></td><td></td><td></td><td></td><td>I</td></t<>	Smoked Wings			150							1,100					I
GROUND TURKEY: 2,270 2.79 6,650 2.66 Patties 160 2.42 360 2.50 Sausage 730 2.29 1,950 2.39 85% lean 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17 rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.	Smoked Necks									٠ ا			.,0.0	970		750
Sausage 730 2.29 1,950 2.39 85% lean 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17 minimal feature activity noted.	GROUND TURKEY:	2,270	2.79	6,650	2.66			•				650				750
Sausage 730 2.29 1,950 2.39 85% lean 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17 minimal feature activity noted.	Patties	160	2.42								600	-000				1
85% lean 130 1.65 1,160 1.71 93% lean 500 2.21 1,590 2.17	Sausage	730	2.29	1,950		minimal	feature activity	noted.		l						\
93% lean 500 2.21 1,590 2.17	· ·					11	-								360	500
100						11										160
	Breast	750	3.94	1,590	4.19						100	Oct 14-20 Oct 21-27	Oct 28-Nov-03	Nov 04-10	Nov 11-17	Nov 18-24

All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: FEATURE RATE: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/: ACTIVITY INDEX: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300)3/: STORES/AVG: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/: SPECIAL RATE: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 18, 2005

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/18 thru 11/24.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	EAS	TERN U.S.		CE	NTRAL U.S.	WESTERN U.S.				
	(CT,DC,DE,FL,GA	A,MA,MD,ME,NC,NH	I,NJ,	(AL,AR,IA,IL,IN,K	S,KY,LA,MI,MN,MO,N	IS,ND,	(AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)			
	NY,PA,RI	,SC,VA,VT,WV)		NE, OH,	OK,SD,TN,TX,WI)					
Feature Rate 1/	100.0% of 8,2	00 sampled outle	ets	100.0% of 4,	900 sampled outle	100.0% of 3,600 sampled outlets 30.3% of stores w/ no-price promotions				
Special Rate 2/	21.4% of stores v			•	w/ no-price prom					
Activity Index 3/		Index = 64,850			Index = 25,200		Activity Index = 24,630			
,	Price Range	Summar	у	Price Range	Summary		Price Range	ry		
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores \	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	
WHOLE BIRDS:										
Fresh - Hens	0.50 - 1.79	14,000	1.14	0.59 - 1.69	4,670	1.15	0.89 - 1.69	4,920	1.22	
" - Toms	0.50 - 1.69	13,770	1.13	0.59 - 1.69	4,530	1.14	0.89 - 1.69	4,670	1.21	
Frozen - Hens	0.19 - 1.29	13,350	0.74	0.29 - 1.39	5,990	0.70	0.19 - 1.39	4,550	0.68	
" - Toms	0.19 - 1.29	12,970	0.73	0.29 - 1.39	5,980	0.69	0.19 - 1.39	4,510	0.66	
PARTS:										
Breast:										
Bone-in, whole										
Fresh	1.69 - 2.99	3,400	2.23	1.69 - 2.49	770	2.13	1.99 - 2.69	1,340	2.34	
Frozen	0.99 - 2.69	3,970	1.42	0.98 - 2.49	1,800	1.48	1.19 - 1.79	2,610	1.41	
Hotel Style										
Fresh										
Frozen										
Split, bone-in										
Fresh										
Rotisserie	4.99 - 7.99	380	7.17	7.99	350	7.99	5.99 - 8.99	1,050	8.24	
Boneless, whole										
Cutlets	3.99	180	3.99							
Strips	3.99	120	3.99							
Tenders										
Drumsticks	0.99 - 1.29	260	1.15	0.99 - 1.29	240	1.01	1.49	490	1.49	
Thighs	1.29	140	1.29	0.99 - 1.29	240	1.01				
Wings	0.99 - 1.59	260	1.32	0.99	220	0.99	1.49	490	1.49	
Necks										
Smoked Drumsticks	1.39 - 1.59	170	1.56	1.39	20	1.39				
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties	2.24 - 2.50	140	2.41	2.50	20	2.50				
Sausage	2.19 - 2.49	690	2.30	1.99 - 2.39	40	2.17				
85% lean				1.65	130	1.65				
93% lean	1.99 - 2.49	500	2.21							
Breast	3.15 - 3.99	550	3.92	3.99	200	3.99				

Note: See page 1 for explanatory notes.